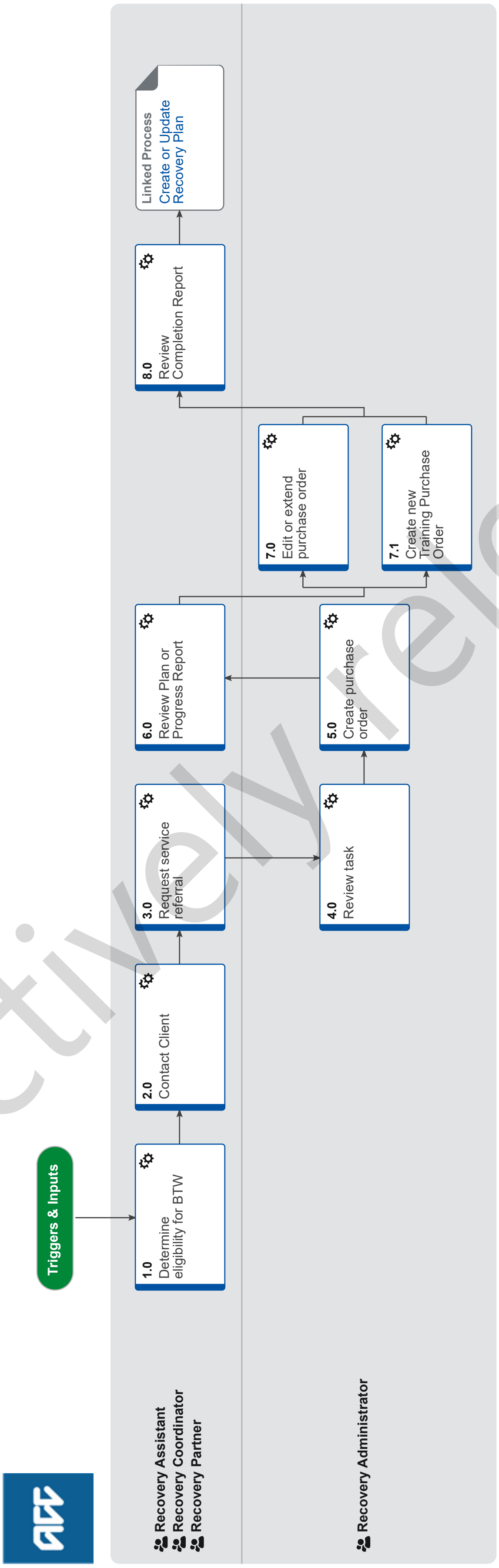
Set Up Back To Work Support v29.0



Set Up Back To Work Support v29.0

Summary

Objective
To support a client to return to the workforce.

Background
The Back to Work (BTW) service is part of the Vocational Rehabilitation Services (VOC) contracts. For details of these contracts, refer to the service page in Promapp.

The Back to Work service is for those clients who have lost their pre-injury role, but need assistance to regain capacity for the pre-injury work type, obtain new employment, become vocationally independent, or increase their employment participation. The provider will tailor the service to accommodate each client’s specific needs and address any barriers to achieving the outcome stated on the referral. The service can be delivered over 3 stages, but depending on their progress they may not have to advance beyond stage one. This service is only for those entitled, or likely to be entitled to weekly compensation.

For more details, refer to the Back to Work service page.

Owner [Name withheld]

Expert

Procedure

1.0 Determine eligibility for BTW
Recovery Assistant, Recovery Coordinator, Recovery Partner

a In Salesforce, open Te Kete and review the client's current circumstances.

NOTE **What do you need to consider when the entitlement request is received and deemed cover exists?**
Refer to the Deemed Cover and Entitlements Policy for considerations to determine client entitlement eligibility while in deemed cover period.

- Vocational Services Roadmap
- Deemed Cover and Entitlements Policy

b Review the following to understand how BTW would benefit your client.

- Back To Work (BTW) Services Service Page
- Vocational Rehabilitation Services Overview (VOC) Service Page

c Check the client meets one of the following criteria for Vocational Rehabilitation Services:
• they are entitled to weekly compensation or Loss Of Potential Earnings (LOPE)
• likely to be entitled to weekly compensation if we don’t provide vocational assistance
• no longer entitled to weekly compensation because they’ve reached the NZ Superannuation Qualifying Age (NZSQA)
• on parental leave.

NOTE **What if the client doesn't meet the eligibility criteria?**
Consider an alternative service for the client. This process ends.

d Consider the following to determine if BTW is appropriate for your client:

• if a S103 outcome is the goal you are seeking for your client. An Initial Occupational Assessment (IOA) and Initial Medical Assessment (IMA) is not required prior to referring your client to this service.
• if a vocational independence outcome (VI) is the goal you are seeking for your client. An IOA and IMA is required prior to referring your client to this service.

NOTE **What if BTW service is not appropriate at this time?**
Consider an alternative service for the client. This process ends.

e Determine the correct level of support required.

NOTE **What if you consider your client will require a more complex VOC service?**
Send the referral for stage one and two.

NOTE **What if I'm unsure if my client will require a more complex VOC support?**
Send the referral for the initial set up only.

NOTE **What if your client has lost their pre-injury employment but should make a full recovery?**
If your client has lost their pre-injury job, but is expected to make a good recovery, you may use a BTW service to request assistance with returning the client to their pre-injury work type. You should evidence in your referral that the client is expected to make a full recovery from their injury and this is the focus of the BTW service.

You should include relevant information with the referral so that the BTW provider is able to document the range of tasks and activities required in the client's pre-injury role.

Your referral should request that the BTW provider assesses and comments upon the client's current functional capacity to return to their pre-injury work type, and lists the expected timeframes and any other activities (such as a Functional Rehabilitation programme) required to support the client to regain capacity for their pre-injury work type.

Finally, the referral should indicate that if the provider ascertains that the client currently has the capacity to return to their pre-injury role, they should write a letter to the certifying medical practitioner to request the appropriate medical clearance.

Before making the referral, you may wish to discuss the client's needs with the treating providers (Physio, GP etc.).

2.0 Contact Client

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Contact the client or authority to act by their preferred method of communication.

NOTE **What if you are unable to contact the client?**
1) Attempt a maximum of two contacts over two full working days before leaving a voicemail or sending a notification to request client contact.

2) If you are unable to reach the client, extend the task for an additional two working days and note in the task description that this is the second attempt to contact the client.

3) On the task due date and if there has been no response from the client to the voicemail or notification, send the CM04 - Advise client that you were unable to reach them by phone letter.
The CM04 letter will be populated with client injury details, however you need to update the letter as follows:

'We recently tried to contact you about your injury that happened on [date of accident auto].
I tried calling you to talk about how we may be able to help you recover from your injury/injuries, but haven't managed to get in touch.
It would be good to hear from you on how you are progressing or discuss what other support we could offer, please give me a call or email me to arrange a convenient time for me to call you back.'

4) Extend the task date as appropriate to take into account postal delivery and note in the task description this is the third attempt to contact the client and the CM04 letter has been sent.

5) On the task due date and if there has been no contact from the client and they are continuing to receive support, seek internal guidance to determine next steps.

6) If you're in Partnered and no contact is made with the client after 3 attempts, you must contact the provider, GP or other verified contact on the claim.

b Confirm you are speaking with the right person by asking ACC's identity check questions.

Identity Check Policy

NOTE **What if you determined your client doesn't meet the VOC criteria?**
Discuss alternatives with your client. Record this conversation as a contact on the claim. This process ends.

c Check the client has granted ACC the authority to collect medical and other records.

View Client Consent

NOTE **What if the client has not granted ACC authority to collect medical and other records?**
Go to (NGCM) Obtain Client Authority to Collect Information. Once received, return to this process.
PROCESS Obtain Client Authority to Collect Information

d Discuss the following with your client:

- why you are recommending them for this service and a reminder of their rights and responsibilities
- the intended outcome of the service is for them to become "work ready"
- advise the client the service consists of tailored, flexible interventions to meet their needs

Client Legislative Rights and Responsibilities Policy

e Confirm your client understands the purpose of the service and agrees to participate.

NOTE **What if the client does not agree to participate?**
Find out why the client does not want to participate, consider their reasoning and alternatives. Record this as a contact on the claim. If you are unsure how to proceed go to (NGCM) Seek Internal Guidance.
PROCESS Seek Internal Guidance

f Advise the client:

- the Provider will contact them to schedule an appointment
- they are able to have a support person with them
- the Provider will send ACC a plan, progress and completion reports

g Check if the client requires a copy of the plan, progress report and completion reports.

NOTE **What if the client wants to receive reports?**
Record this in the Vocational Life area in the Recovery Plan.

h Check if the client has a preferred Provider.

NOTE **What if the client has a preferred Provider?**
Using the Contracted Suppliers by Geographic Area of Coverage doc, confirm the Provider is contracted for this service and add as a participant on the claim.

If they are not a contracted provider for this service advise alternative Providers to your client and add as a participant on the claim.

Manage Participants (Eos Online Help)

Contracted Suppliers by Geographic Area of Coverage

i In Salesforce, record the conversation as a contact on the claim.

j Add the Agreed Intervention to the Recovery Plan.

NOTE **What if you are unsure how to add an Agreed Intervention?**
Go to (NGCM) Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

3.0 Request service referral

Recovery Assistant, Recovery Coordinator, Recovery Partner

a In Eos, check the following documents are on the claim:

- previous/most recent Vocational Rehabilitation documents
- recent medical information
- current medical certificate
- ACC45
- Individual Recovery Plan
- Curriculum Vitae

NOTE **What if there is information missing?**
Go to (NGCM) Request Clinical Records. Once received, return to this process.
PROCESS Request Clinical Records

b Check if there are documents on other claims relevant to the referral.

NOTE **What if there are documents on other claims?**
Create a copy and transfer to the other claim:

- Create a bulk print of documents on the other claim, complete mandatory fields and add a description
- Open PDF document from email link
- File the PDF away to the claim you are creating the referral on
- Repeat these steps if there are documents on other claims

Provide a short and descriptive title to the document properties in the PDF and state the claim number the information came from eg Medical records and reports from claim: 100XXXXXXXX.

Do not create a bulk print on one claim and move it to a different claim as it will not appear in any file copy requested by the client.

c Perform privacy checks on documents.

Privacy Check Before Disclosing Information Policy

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

NOTE **What if you find information that needs to be redacted?**
Send an email to Recovery Administration (recoveryadmin@acc.co.nz) and include the document to be redacted plus your redaction instructions.

If the claim is a complex mental injury (CMI) claim and you are unable to do the redactions yourself, send an email to Recovery Administration (recoveryadmin1@acc.co.nz) and include the document to be redacted plus your redaction instructions. If you have Adobe Pro and are able to do the redactions yourself, ensure you redact all appropriate information.

d In Eos, create a document group titled 'Back to Work' and add the applicable documents to the group.

- Manage document groups

e In Eos, generate a Vocational Rehabilitation referral task for a 'Back to Work'. For further information refer to Referring Tasks to Recovery Administration - Principles.

- Creating Manage Referral Tasks - System Steps
- Referring Tasks to Recovery Administration - Principles

f Complete the mandatory fields in the e-form.

NOTE **What information do you need to include in the task/e-form?**
Refer to the 'Manage Referral Task Templates document'

NOTE **What if you are asking the provider to complete a function component?**
Back to Work Initial Functional rehabilitation requires prior approval from ACC.
Ensure you are adding the functional codes for approval in your task to admin.
VRB15

- Manage Referral Task Templates
- Service Contracts and Contracted Providers - MFP spreadsheet
- Disclosure of Care Indicator Information to Third Parties Policy

g Consider the timing of the task. The tasks route to the Recovery Administration team with an SLA of 24 hours.

NOTE **What if the request is urgent and needs to be completed that day?**
Call Recovery Administration, provide the claim number and request the task is completed today.

NOTE **What if the request is required in the future?**
If the support is required in the future, set a reminder task for the future date when the support will be required.

When the reminder task is due return to Activity 3.0 Request service referral.

Review the contract timeframes and SLAs as specified in the service page.

4.0 Review task

Recovery Administrator

a Following the task assignment in Salesforce, navigate to Eos and select 'Do Task' from your task queue.

b Check if the task is NGCM - Send Vocational Referral.

NOTE **What if this is a NGCM - Admin Request task?**
Go to Activity 7.0 Edit or extend purchase order or Activity 7.1 to Create a new Training Purchase Order.

c Review the task to ensure it has the required information to complete the referral form

NOTE **What if you don't have all the information you need?**
If required information is missing from the task, or you need guidance on working within the Administration Team, refer to the link below

- Principles of Working in the Administration Team

NOTE **What if you receive a NGCM - Admin Request task for a re-referral as the Provider is unable to accept a referral?**
Continue to Activity 5.0 Create Purchase Order.

5.0 Create purchase order

Recovery Administrator

a In Eos, generate a Purchase Order using referral type Back to Work.

- NG GUIDELINES Purchase Order Details - Back to Work
- Purchase Order - Handy Hints on how to create and edit POs

NOTE **What if this is a re-referral?**
Locate the original Purchase Order and continue with this process.

Creating purchase orders using general + QE

b Identify and select a BTW vendor using the Geographic Location search.

NOTE **What if this is a re-referral?**
Update the original Purchase Order with the new Provider and continue with this process.

Contracted Suppliers by Geographic Area of Coverage

NOTE **What if a preferred vendor has been specified in the task?**
Select the vendor from the Contracted Supplier by Geographic Area Coverage list. Go to task (d) Approve Purchase Order. If the preferred vendor is not available, contact the referring recovery team member for advice on alternate vendor.

c Add the selected Vendor as a participant on the claim.

Manage Participants (Eos Online Help)

d Approve the purchase order.

NOTE **What if the purchase order requires a higher delegation?**
Refer to the system steps below.

Request Authorisation for a Purchase Order - System Steps

e Select 'Add documents' and generate the ACC98 referral for Back to Work.

f Add additional information received in the task to the referral. For guidance refer to the Admin Template - Back to Work.

Admin Template - ACC98 Back to Work Referral

g Perform privacy checks on the documents in the group.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

Privacy Check Before Disclosing Information Policy

h Complete the documents and convert them into non-editable PDFs.

NOTE **What if there is a document group?**
Open document group and link the ACC98 to the group and email to the vendor.

i Create and send an email using 'Requests and referrals' template.

NGCM - FINAL Emailing from Eos using a Template - System Steps

NOTE **What if the email is too large to send as a single email?**
Contact the vendor and ask if the referral can be sent by courier. If yes, confirm correct physical address then go to Prepare and Send Client Information by Courier then return to this process. Otherwise, send by email.

j In Salesforce, close the referral task.

6.0 Review Plan or Progress Report

Recovery Assistant, Recovery Coordinator, Recovery Partner

a In Eos, open the ACC7431 Back to Work initial and progress report.

ACC7431 BTW Initial and Progress Report

NOTE **What if the Provider requests an Initial Functional Rehabilitation component?**
Back to Work Initial Functional Rehabilitation requires prior approval from ACC. If approved send request to Recovery Admin to update the Purchase Order with VRB15 code

NOTE **What if the provider requests that the client would be more suitable for a Pathways to Employment?**
Advise the provider that you consider the referral is the most appropriate for your client.

NOTE **What if the Provider or client advised they failed to attend?**
Go to Manage Non-Compliance.

PROCESS Manage Non-Compliance

b Perform privacy checks on the report.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

Privacy Check Before Disclosing Information Policy

c Determine the suitability of the recommendations or request.

NOTE **What if you are unsure about recommendations made in the plan?**
Contact the Provider to discuss and negotiate changes. Record this conversation as a contact on the claim. Once an amended report is received (if applicable) return to this process.

NOTE **What if the Provider has contacted you to request the Back to Work Service is put on hold?**
Discuss the rationale for this request. Based on this discussion, if you decide to put the Service on hold, advise the provider of the decision and upload this correspondence to the claim. Update Salesforce accordingly.

Otherwise advise the Provider your decision to decline. Record this conversation as a contact on the claim.

NOTE **What if the Provider has contacted you to request the Back to Work Service is reinstated?**
Upload this correspondence to the claim and update salesforce accordingly.

NOTE **What if the Provider requests an Obtain Work Trial set-up or monitoring?**
No prior approval is required for billing the first Obtain Work Trail set-up and Obtain Work Trial monitoring.

If an additional Obtain Work Trial is requested, review the request from the Provider.

• Check if any barriers identified in the previous Obtain Work Trial have been addressed. If not, these barriers should be addressed prior to approval of an additional Obtain Work Trial.
• Check the Obtain Work Trial job is a work type stated in the Initial Medical Assessment as currently medically sustainable or likely to be medically sustainable.
• Check medical certification has been received from the client's Medical Practitioner.

If the above eligibility criteria are met, consider approving the additional Obtain Work Trial.

To approve this, create an 'NGCM - Edit Manage Referral Purchase Order' task requesting the purchase order be updated with the Obtain Work Trial set-up and monitor codes and notify the provider.

NG GUIDELINES Purchase Order Details - Back to Work

d Check if the plan has identified additional vocational training components.

NOTE **What if the report identifies vocational training components to be paid directly to a third party provider?**
Create a NGCM - Admin request task to create a new purchase order. Provide the service item code VT01 for vocational training excluding computer training or VT02 for computer training, vendor code, cost and date range who should be advised of the approval (Training vendor or BTW provider).

NOTE **What if the report identifies vocational training components to be paid by the Back to Work Service provider?**
Create a NGCM - Edit Manage Referral Purchase Order to add the component to the existing purchase order. Provide service item code VT01 for vocational training excluding computer training and VT02 for computer training, vendor code, cost, purchase order number and date range.

e Check if the plan has identified the client requires progression to Stage 2, 3 or exceptional of the Back to Work Service. Consider the Provider's rationale as to why Stage 2, 3 or exceptional is required.

NOTE **What if you have determined Stage 2, 3 or exceptional is appropriate?**
Create a NGCM - Edit Manage Referral Purchase Order' task requesting the purchase order is updated as progress report.

NOTE **What if you have determined Stage 2, 3 or exceptional is not appropriate?**
Contact the Provider to discuss their rationale. Based on this discussion, if you decide Stage 2, 3 or exceptional is required Create a NGCM - Edit Manage Referral Purchase Order requesting the purchase order is updated as per the providers rationale and the progress report. Otherwise advise the Provider your decision to decline. Record this conversation as a contact on the claim.

f Check if the client has requested copies of the reports in the Vocational Life area of the Recovery Plan.

NOTE **What if the client has requested copies?**
Send the reports by the clients preferred method of communication.

NOTE **What if the GP or another party request copies of the report?**
Provide a copy to the GP and any other stake holders as you consider appropriate (ensuring the client has given permission)

NOTE **What if the client advises there is information in the report which is factually incorrect?**
Contact the Provider and request the incorrect is updated on the report and an amended report is provided. For further guidance refer to Managing a client's request to change personal information.

Managing a client's request to change personal information

NOTE **What if the client advises they disagree with the opinion provided the assessor in the report?**
The client can supply a 'statement of correction' to ACC which is then included with the report. This means any time the report is sent out, the statement of correction must be sent as well.

7.0 Edit or extend purchase order

Recovery Administrator

a Based on the type of request check the following has been provided in the task:

STAGE 2, 3 or exceptional:
• Purchase Order Number
• Purchase Order Code
• Date range

Obtain Work Trial:
• Purchase Order Number
• Purchase Order Code
• Date range

NOTE **What if there is information missing?**
Go to the 'Task clarification' section in NG PRINCIPLES Working in the Administration Team for instructions.

Principles of Working in the Administration Team

b In Eos, to locate the purchase order:

• click on “Search for a claim”
• select the “Purchase Order / ACC32 Number” tab
• paste the purchase order number into the 'purchase order number' field
• select “Open”

c Update the purchase order using the following instructions:

• select "Add" to add a new line
• select the 'Intervention' then 'Ok'
• search for the purchase order code
• select 'Add to list' then 'Ok'
• add the information provided in the task then 'Ok'

d Approve the purchase order.

NOTE **What if the purchase order requires a higher delegation?**
Refer to the system steps below.

Request Authorisation for a Purchase Order - System Steps

e Create and send an email using the 'Purchase Order Approval and Extension' template.

NGCM - FINAL Emailing from Eos using a Template - System Steps

f In Salesforce, close the task.

7.1 Create new Training Purchase Order

Recovery Administrator

a Check the following has been provided in the task:

• Purchase Order Code
• Name of vendor
• Date range
• Cost
• Confirmation of where to send the approval

NOTE **What if there is information missing?**
Go to the 'Task clarification' section in NG PRINCIPLES Working in the Administration Team for instructions.

Principles of Working in the Administration Team

b In Eos, generate a Purchase Order using General+QE.

Creating purchase orders using general + QE

c Add the selected Vendor as a participant on the claim.

Manage Participants (Eos Online Help)

d Approve purchase order.

NOTE **What if the purchase order requires a higher delegation?**
Refer to the system steps below.

Request Authorisation for a Purchase Order - System Steps

e Create and send an email using the 'Purchase Order Approval and Extension' template.

NGCM - FINAL Emailing from Eos using a Template - System Steps

f In Salesforce, close the task.

8.0 Review Completion Report

Recovery Assistant, Recovery Coordinator, Recovery Partner

a In Eos, open the ACC7980 Back to Work completion report.

ACC7980 BTW Completion Report

b Perform privacy checks on the report.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

Privacy Check Before Disclosing Information Policy

c Check if the client has requested copy of the report in the Vocational Life area of the Recovery Plan.

NOTE **What if the client has requested a copy?**
Send the reports by the clients preferred method of communication.

d Open the Agreed Intervention in the Recovery Plan and add the outcome.

NOTE **What if you are unsure how to add the outcome?**
Go to Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

e Determine the next steps to progress the client's recovery.

NOTE **What if you're unsure how to progress?**
Go to Seek Internal Guidance
PROCESS Seek Internal Guidance

PROCESS **Create or Update Recovery Plan**
Recovery Assistant, Recovery Coordinator, Recovery Partner
